

GUIDELINES:
STUDENT EDUCATION AND CAREER PLANNING AND EVALUATION
TOOLS
(09/00)

DOCUMENT TITLE: Student Education and Career Record Evaluation (SECRE Form)

HOW: The Guidance Counselor and/or School Representative:

- Complete the top portion;
- Review all evaluation data, summarize data on the record, sign and date the record; and
- Update as appropriate.

The Workplace and School Representative;

- Review all evaluation data, check off, sign and date in the column parallel to the skills attained by the student.

WHO: Guidance counselors and/or school staff as well as employer representatives.

FOR WHOM: All students participating in the School-to-Career System (Grades 9-12).

WHEN: Quarterly, at minimum. May be completed at the conclusion of specific structured projects.

WHERE: School and Workplace.

WHY: To record progress in mastery of academics, technical and employability skills, in school and in the workplace.

Student Education and Career Record and Evaluation Form
For Certificate of Initial Mastery – Business and Finance

Student _____

Educational Institution _____

Counselor/
Advisor _____

Grade (Secondary)

☐ 9 ☐ 11

☐ 10 ☐ 12

Semester (Postsecondary)

☐ 1 ☐ 3

☐ 2 ☐ 4

Employer I _____
Name

Address

Educator _____
Name

Employer 2 _____
Name

Address

Educator _____
Name

Employer 3 _____
Name

Address

Educator _____
Name

Skills	School-Based Learning	Work-Based Learning
<i>I. ACADEMIC SKILLS</i>		
LANGUAGE ARTS		
• Reading		
1. Locate and use reference materials		
2. Sequence information		
3. Compare and contrast information		
4. Interpret technical documents, manuals and tables		
5. Identify main and subordinate ideas		
6. Cross-reference information		
7. Follow directions to achieve an objective		
8. Identify cause and effect relationships		
9. Draw conclusions from facts		
10. Predict consequences		
11. Interpret abbreviations, symbols and graphs		

Skills	School-Based Learning	Work-Based Learning
• Writing		
1. Organize and relate ideas		
2. Develop preliminary outline		
3. Use standard grammar and punctuation		
4. Create clear memos and letters		
5. Proofread and edit		
6. Complete forms and applications		
7. Take notes		
8. Create and interpret graphs and charts		
• Communication Skills		
1. Exchange ideas		
2. Ask and answer questions		
3. Organize and express directions in logical sequence		
4. Convey thoughts upward, downward and laterally		
5. Comprehend ideas and instructions		
6. Follow directions to achieve an objective		
7. Use appropriate body language		
8. Distinguish between relevant and irrelevant		
9. Identify cause and effect information		
10. Infer meaning		
11. Draw conclusions		
12. Predict consequences		
13. Apply data analysis to job tasks		
14. Demonstrate interviewing skills		
15. Demonstrate telephone skills		
• Mathematics		
1. Add, subtract, multiply and divide whole numbers, decimals, fractions and mixed numbers		
2. Convert decimals, fractions, ratios & percentages		
3. Conduct linear, area, volume capacity and weight measurements		
4. Calculate ratios and proportions		
5. Estimate to nearest whole numbers		
6. Apply statistical principles		
7. Apply algebraic principles		
8. Apply geometric principles		
9. Identify trends from data		
10. Create and interpret tables and graphs		
11. Use a calculator		

Skills	School-Based Learning	Work-Based Learning
• Sciences:		
1. Demonstrate basic understanding of biology		
2. Demonstrate basic understanding of chemistry and physics		
• Computer Knowledge		
1. Operate a personal computer		
2. Have keyboarding skills		
3. Use word-processing software		
4. Use specialized software		
5. Use database software		
6. Use CD-ROMS		
7. Establish document storage		
8. Use computer communication		
9. Use computers to format		
10. Enter simple data		
11. Use computer spreadsheets		
12. Apply computers to job tasks		
13. Apply computers to job tasks		
II. TECHNICAL SKILLS		
• Communication Skills		
Articulate speaking skills		
Excellent listening skills		
• Problem-solving skills		
Understand products and services		
Understand terminology		
Understand the financial dynamics of		
the business and how it functions,		
how the parts fit together, how it		
operates in the marketplace, how it		
competes, its key leverage points, and		
how actions and decisions translate to		
the bottom line.		
Understand how the economy impacts		
business risk and returns		
Understand economic trends and		
business cycles in the USA during the		
21 st century		
Understand the development of		
business regulation		
• Computer Knowledge and Skills:		
Understand importing document		
Use specialized software such as MS		
Office (Word, Excel, PowerPoint,		
Outlook), email, desktop publishing or		
graphics programs,(proficient with		
numbers, symbols, keypad, possess		
accuracy, rhythm, speed)		

Skills	School-Based Learning	Work-Based Learning
<ul style="list-style-type: none"> Computer Knowledge and Skills 		
Understand importing document		
Use specialized software such as MS		
Office (Word, Excel, PowerPoint,		
Outlook), email, desktop publishing or		
graphics programs,(proficient with		
numbers, symbols, keypad, possess accuracy, rhythm, speed		
Use computer for basic bookkeeping		
functions		
Understand use of the Internet		
III. EMPLOYABILITY SKILLS		
<ul style="list-style-type: none"> Attitudes & Attributes 		
1. Takes initiative		
2. Assumes responsibility		
3. Displays a good self-concept		
4. Persists until job is done		
5. Works well without supervision		
6. Takes responsibility for production/quality		
7. Conflicts do not impede performance		
8. Seeks new challenges		
9. Applies ethics to behavior		
10. Responds well to criticism		
11. Maintains a professional image		
12. Works well under stress		
13. Displays positive behaviors		
14. Follows instructions		
15. Adheres to code of conduct		
<ul style="list-style-type: none"> Customer Service 		
1. Adopt a customer service orientation		
2. Gather information from various sources to identify prospective customers/markets		
3. Communicate with customer in a professional manner		
4. Maintain accurate and complete information about customers		
5. Document and process customer information/orders		
6. Interpret customer information to identify needs		
7. Offer options to problems and negotiate solutions		
8. Show customers how to implement, plan and take action whenever necessary		
9. Monitor implementation plan and take		
10. Identify new customer needs		
11. Inform customer when needs cannot be met		
12. Make alternative recommendations		
13. Analyze customer feedback to improve internal customer support process		

Skills	School-Based Learning	Work-Based Learning
• Team Work		
1. Works effectively in a team		
2. Follows instructions		
3. Takes initiative		
4. Provides support to others		
5. Fosters innovation		
6. Manages relationships		
• Adaptability		
1. Accepts changes		
2. Performs multiple assignments		
3. Shows flexibility		
4. Adjusts style to the situation		
5. Handles multiple tasks simultaneously		
6. Adapts skills to new tasks		